



**Montgomery County  
Department of Health and Human Services**

# **Monthly ServicePoint Data Quality Review**

**How-to Workbook for Homeless Services Providers**

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**To obtain assistance ServicePoint, ART or report assistance:**

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## Monthly ServicePoint Data Quality Review How-to Workbook for Homeless Services Providers

This workbook shows how **Homeless Services Providers** should run their required ServicePoint data quality reports, how to find required inputs for the **Monthly ServicePoint Data Quality Review** form, and how to solve common data quality problems.

### 213 - UDE Completeness - Entry Exit Workflow (*Run in ART.*)

**Location:** Public Folders/Montgomery Live Folder/Data Quality (Agency Admin) Reports.

Figure 1: 213—UDE Completeness Prompts

-  Select the **name of your provider** in the report prompts.
  -  The **Start Date** and **End Date PLUS 1 Day** should reflect the month for which you are submitting the report. (As an example, the report you submitted by March 15, 2012 was for February 2012.)
-  Click **Run Query** to create the report.

**Monthly ServicePoint Data Quality Review  
Homeless Services Providers**

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**213 - UDE Completeness - Entry Exit Workflow (Run in ART.)**

- **Location:** Public Folders/Montgomery Live Folder/Data Quality (Agency Admin) Reports
- Run "unduplicated."
- Use current quarter to determine Start Date and End Date.

	Last Month		This Month	
	% Errors	Grade	% Errors	Grade
Adults and Unaccompanied Youth	%		1 %	
Children	%		2 %	

**216 - Unexited Client Expiration Review - Length of Stay (Run in ART.)**

Figure 2: 213—UDE Completeness, on Monthly Report Review

Universal Data Element Completeness  
HMIS Data Quality Report  
Version Based on Entry Exit Records  
Date Range: 1/1/12-3/31/12

Adults and Unaccompanied Youth Error Grade	Children Error Grade
9.20% A	21.02% C

Universal Data Element	Records with no value	Records where value refused or unknown
Social Security Number	2.85%	12.28%
Date of Birth	2.85%	5.52%
Ethnicity	2.85%	5.36%
Race	2.85%	3.41%
Gender	2.85%	4.77%
Marital Status	8.41%	8.107%
Housing Condition	11.36%	21.28%
Housing Status	11.36%	8.36%
Homelessness Primary Reason	8.41%	5.81%
Contributing Factor to Homelessness	8.41%	5.81%
Is Client Chronically Homeless?	8.41%	NA
Living Situation Prior to Program Entry	8.41%	1.107%
Length of Stay at Prior Living Situation	8.41%	1.87%
ZIP Code of Last Permanent Address	8.41%	2.86%
Income received from any source in past 30 days?	12.28%	8.32%
Non-Cash Benefits received in past 30 days?	12.28%	7.26%
Domestic Violence victim/survivor(S)?	14.02%	3.79%

IMPORTANT: This report pulls data from the Entry of the Entry Exit worksheets.

6/10/2012 10:21:02 AM

Figure 3: 213—UDE Completeness ART Report

Refer to **Figure 2** (above), and **Figure 3** (left).

- 1 Enter the percentage of errors and letter grade for **Adults and Unaccompanied Youth** into the appropriate fields on the **Monthly ServicePoint Data Quality Review**.<sup>1,2</sup>
- 2 Enter the percentage of errors and letter grade for **Children** into the appropriate fields on the **Monthly ServicePoint Data Quality Review**.
- 3 All of these data elements are required, so there cannot be any numbers in **Records with No Value**. Subsequent pages of the report will show which clients and case workers are missing data. This data entry must be completed.

<sup>1</sup> To facilitate progress tracking, the **Monthly ServicePoint Data Quality Review** includes a field for Last Month's data. Leave this field blank the first month, but complete it in consecutive months.

<sup>2</sup> No providers in our continuum of care offer services to unaccompanied youth.

\* While records where value is refused or unknown are not necessarily in error, a high percentage can indicate poor data collection or data entry practices. "Unknown" means the client doesn't know the information, **not** that you neglected to ask.

## 216 – Unexited Clients Exceeding Maximum Length of Stay (*Run in ART.*)

Location: Public Folders/Montgomery Live Folder/Data Quality (Agency Admin) Reports

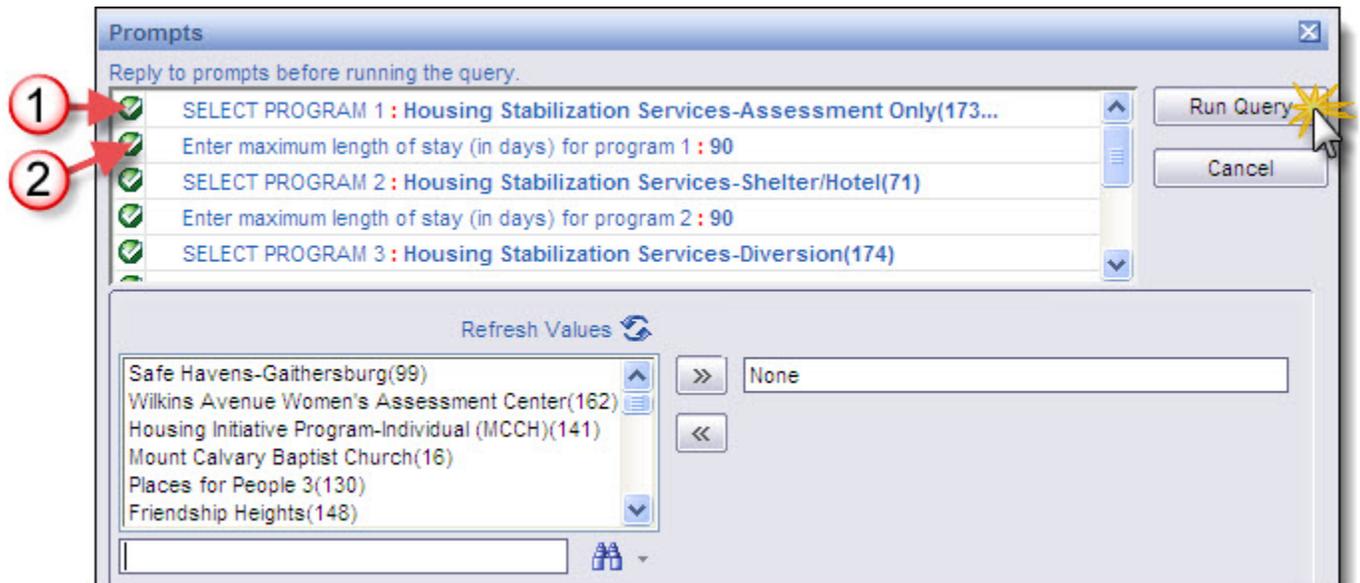


Figure 4: 216—Unexited Clients Exceeding Maximum Length of Stay Prompts

- 1 Select the **name of your program** in the report prompts.
  - 2 Enter the **maximum length of stay** for your program. The prompt is pre-filled with **90 days**, which is the appropriate maximum length of stay for most programs in our continuum.
-  Click **Run Query** to create the report.

**216 – Unexited Clients Exceeding Maximum Length of Stay (Run in ART.)**

- **Location:** Public Folders/Montgomery Live Folder/Data Quality (Agency Admin) Reports

<b>Clients Exceeding Maximum LOS</b> (If a client who has exited the program is on the report, check to verify that there are no extra entries.)	<b>1</b>	(Number of clients exceeding 90 days.) <input type="checkbox"/> I verify that <u>all</u> of these clients are still being served. <input type="checkbox"/> I have exited clients who have not received services in the last 30 days.
<b>Multiple Entries for Same Client</b> (highlighted in yellow on the report)	<b>2</b>	Number of clients that had multiple entries. <input type="checkbox"/> Duplicate (multiple) Entries have been exited or deleted.*

\*Note: You must delete extra entries from the profiles of each member of the household.

Figure 5: 216—Unexited Clients Exceeding Maximum Length of Stay, on report

Maximum Length of Stay = 90 days	
Number of Unexited Clients:	159
Client Stays Exceeding Max LoS:	58
Multiple Entries for Same Client	75
Average Unexited LoS	65 days

Figure 6: 216 Unexited Clients Exceeding Maximum Length of Stay, Summary

Refer to **Figures 5** and **6**, above.

- 1** Enter the number of clients exceeding the specified maximum length of stay.
- **Verify** that all clients on this report are still being served.
- Exit** any clients who are not currently being served.

- 2** Enter the number of clients who have multiple open program entries.
- This number should **always** be zero.
  - Look at the client’s **Entry/Exits**
    - If there are entries that were created by mistake, **delete** them.<sup>1</sup>
    - If Entries were mistakenly left open when other Entries were created, **Exit** them!

<sup>1</sup> When you delete an Entry/Exit, you visit the profile of each household member to delete the corresponding Entry/Exit.

## Case Worker Records - Data Quality Part 1 (Run in ART.)

**Location:** Public Folders/Montgomery Live Folder/Data Quality (Agency Admin) Reports

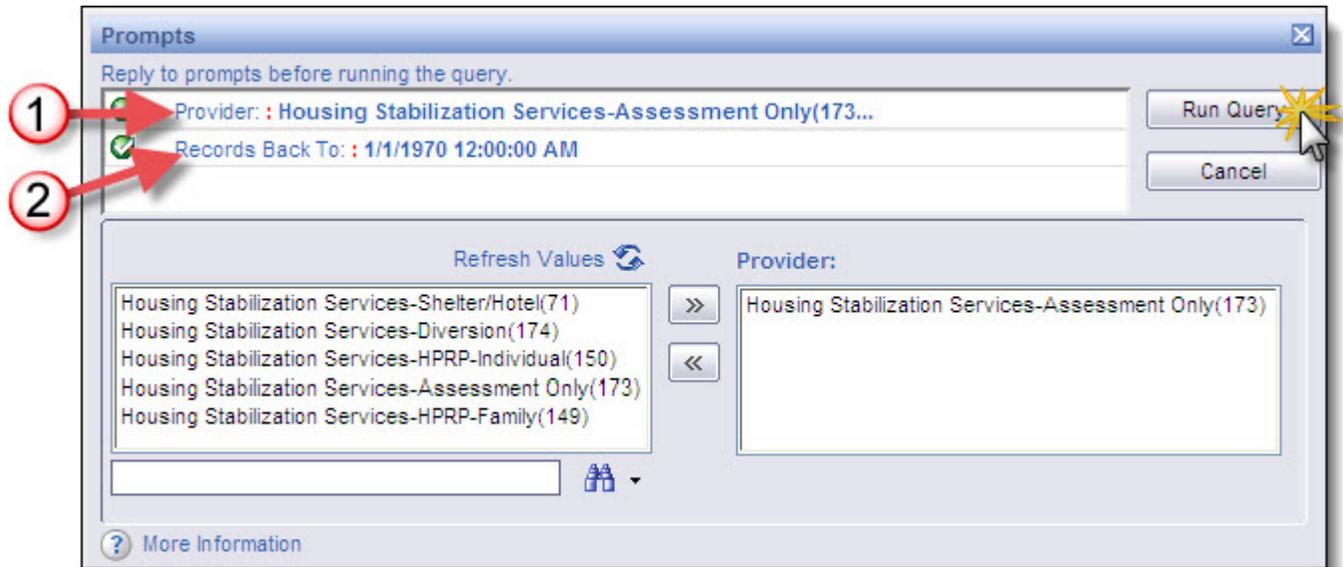


Figure 7: Case Worker Records—Data Quality Part 1, prompts

- 1 Select the **name of your provider** in the report prompts.
  - 2 **Records Back To** is set by default to 1/1/1970. That's as it should be. You must correct all errors, from the beginning of our use of ServicePoint.
-  Click **Run Query** to create the report.

**Monthly ServicePoint Data Quality Review  
Homeless Services Providers**

Client ID	First Name	Last Name	Entry/Exit Provider ID	Entry Date	Entry/Exit Date	Case Worker Open	Case Worker Closed
1840	Janet	Reynolds	Housing Rehabilitation Services Assessed Only (TS)	10/11/11	10/11/11	Yes	
1702	Rebecca	Reardon	Housing Rehabilitation Services Assessed Only (TS)	01/11/11	02/11/11	Yes	
1769	Walter	Leach	Housing Rehabilitation Services Assessed Only (TS)	09/11	09/11	Yes	
1802	Nancy	Call	Housing Rehabilitation Services Assessed Only (TS)	10/01/11	11/01/11	Yes	
1810	Talmon	Proctor	Housing Rehabilitation Services Assessed Only (TS)	11/01/11	11/01/11	Yes	
1840	Vera	Callagane	Housing Rehabilitation Services Assessed Only (TS)	10/12	11/01/11	Yes	
18187	Ryan	Reuter	Housing Rehabilitation Services Assessed Only (TS)	11/18/11	11/18/11	Yes	
4810	Christina	Thomas	Housing Rehabilitation Services Assessed Only (TS)	11/01/11	11/01/11	Yes	
17214	Ashlee	Ward	Housing Rehabilitation Services Assessed Only (TS)	11/01/11	11/01/11	Yes	
1879	Samuel	Yates	Housing Rehabilitation Services Assessed Only (TS)	12/01/11	12/01/11	Yes	

**First Tab of Report**

1

This tab shows clients who have case worker records still open although the client has been exited from the program.

- Close the case worker record.

Figure 8: Entry/Exit Closed, Case Worker Open

Client ID	Client First Name	Client Last Name	Entry/Exit Provider ID	Entry/Exit Entry Date	Case Worker Date Entered	Days Between Case Worker Start and Entry/Exit Date
88	TAMARA	BLACKBURN	Housing Rehabilitation Services Assessed Only (TS)	02/02/11 12:01:00 AM	01/03/11 12:00:00 AM	13
18388	Michelle	Logan	Housing Rehabilitation Services Assessed Only (TS)	01/10/11 12:01:00 AM	01/03/11 12:00:00 AM	7
10333	Michelle	Callan	Housing Rehabilitation Services Assessed Only (TS)	02/02/11 12:01:00 AM	02/03/11 12:00:00 AM	8
17371	Michelle	Johnson	Housing Rehabilitation Services Assessed Only (TS)	01/02/11 12:01:00 AM	01/03/11 12:00:00 AM	1
12541	Carlene	Goodman	Housing Rehabilitation Services Assessed Only (TS)	02/10/11 12:00:00 AM	02/03/11 12:00:00 AM	7
15410	Shelita	Vance	Housing Rehabilitation Services Assessed Only (TS)	11/05/10 11:07:00 PM	11/05/10 10:00:00 AM	1

**Second Tab of Report**

2

This tab shows case worker records where the case worker record begins before the Entry/Exit.

- Adjust the case worker record to match the Entry Date.

Figure 9: Case Worker Record Before Entry/Exit

## HUD CoC APR (Run in ServicePoint.)

Location: Reports/Provider Reports

The screenshot shows a web form titled "HUD CoC Annual Performance Report". The form has a "Report Options:" section with the following fields and controls:

- Provider Group:** A dropdown menu with "-Select-" selected. A red circle with the number "1" is next to the "Unduplicated" checkbox, which is checked.
- Provider:** A dropdown menu with "Everything for Everybody" selected. A red circle with the number "2" is next to it. Below the dropdown are two radio buttons: "This provider AND its children." (unselected) and "This provider ONLY." (selected).
- Operating Year Date Range:** Two date input fields with "03/01/2012" and "03/31/2012" entered. A red circle with the number "3" is next to the first field. A note "(mm/dd/yyyy)" is to the right.
- Legal Adult Age:** An input field with "18" entered. A note "(as defined by foster care law in your state)" is to the right.
- Build Report:** A button with a yellow starburst icon and a hand cursor pointing to it.

Figure 10: CoC APR Prompts

-  Run the report as **Unduplicated**.
-  Select the name of your **Provider**..
-  Use the current month as the **Operating Year Date Range**.
-  Click **Build Report** to create the report.

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✓ HUD CoC APR (Run in ServicePoint.)

- Location: Reports/Provider Reports
  - Run "unduplicated."

<b>Total Number of Records for All Clients (Question 7)</b>	<b>1</b>	_____	Total number of records for all clients.
<b>Unaccompanied Children (Question 7)</b>	<b>2</b>	<input type="checkbox"/>	Verified there are no records for unaccompanied children. <sup>1</sup>
<b>Unknown Household Type (Question 8)</b>	<b>3</b>	<input type="checkbox"/>	Verified there are no households with "Unknown Household Type." <sup>2</sup>

<sup>1</sup> Unaccompanied children may be reported because an inaccurate birth date has been entered, or because a child has not been attached to a household. Click on the hyperlinked number in the report to look at the profile of any unaccompanied children.

<sup>2</sup> "Unknown Household Type" can result when someone in the household is missing a date of birth.

Figure 11: CoC APR Question 7 and 8 on Monthly Data Quality Review

7. Combined HMIS and Comparable Database Data Quality		
Total number of records for All Clients	<b>1</b>	<a href="#">476</a>
Total number of records for Adults Only		<a href="#">195</a>
Total number of records for Unaccompanied Children	<b>2</b>	<a href="#">2</a>
Total number of records for Leavers		<a href="#">356</a>
Combined HMIS and Comparable Data Quality		
Data Element	Don't Know or Refused	Missing Data
First Name	0	0
Last Name	0	0
SSN	<a href="#">78</a>	<a href="#">2</a>

Figure 12: CoC APR Question 7

- The first line of **Question 7** (see **Figure 11**, above) on the **CoC APR** shows the **total number of records for all clients**.
- The third line of **Question 7** (see **Figure 12**, above) on the **CoC APR** shows the number of **Unaccompanied Children**. Because your provider does not provide service to **Unaccompanied Children**, this number should be '0'.
  - If your report shows a number other than '0', click on the [blue hyperlinked number](#) to see which clients are reporting as unaccompanied children.
  - A client reports as an unaccompanied child on the CoC APR if he or she is **under 18 years of age** and in a **household of one**.
    - Double-check the client's **date of birth**, and whether he or she is **part of a household**.

8. Persons Served During the Operating Year by Type					
Number of Persons in Households Served During the Operating Year					
	Total	Without Children	With Children and Adults	With Only Children	Unknown Type
Adults	<a href="#">195</a>	<a href="#">9</a>	<a href="#">185</a>	<a href="#">3</a>	<a href="#">1</a>
Children	<a href="#">272</a>		<a href="#">272</a>	0	0
Don't Know/Refused	<a href="#">9</a>	0	<a href="#">3</a>	0	<a href="#">6</a>
Missing Information	0	0	0	0	0
Total	<a href="#">476</a>	<a href="#">9</a>	<a href="#">460</a>		

Figure 13: CoC APR Question 8

- 3** The furthest column on the right in **Question 8** (see **Figure 14**, above) on the **CoC APR** shows clients who are in households of **Unknown Household Type**. There should be no households of unknown type!
- ServicePoint calculates the Household Type on the **CoC APR** based on the **birthdates** of household members.
  - In any household reported as Unknown Household Type, at least one person is missing a date of birth. **Click on any hyperlinked numbers** in the **Unknown Type** column to find the households where dates of birth are missing.

<b>Known Physical and Mental Health Condition at Exit— Leavers (Question 22a2)</b>	<b>4</b> _____ Number of persons indicated with no known conditions at Exit. <sup>3</sup>
	<input type="checkbox"/> I verify that all clients listed as "none" have no known disabling conditions.
<sup>3</sup> Disabling Conditions are reported on the <u>Entry</u> . Click on the hyperlinked number in the "none" box to see the clients who are reporting as "none."	

Figure 14: CoC APR Question 22a2, on form

22a2. Known Physical and Mental Health Condition at Exit - Leavers				
Number of Known Conditions Leavers - Total Number by Type				
	All Persons	Adults	Children	Unknown
<b>4</b> None	<a href="#">275</a>	<a href="#">119</a>	<a href="#">156</a>	0
1 Condition	<a href="#">9</a>	<a href="#">7</a>	<a href="#">2</a>	0
2 Conditions	0	0	0	0
3+ Conditions	<a href="#">1</a>	<a href="#">1</a>	0	0
<b>5</b> Condition Unknown	<a href="#">13</a>	<a href="#">10</a>	<a href="#">3</a>	0
Don't Know/Refused	<a href="#">15</a>	<a href="#">5</a>	<a href="#">10</a>	0
Information Missing	<a href="#">43</a>	<a href="#">3</a>	<a href="#">40</a>	0
Total	<a href="#">356</a>	<a href="#">145</a>	<a href="#">211</a>	0

Figure 15: CoC APR Question 22a2

## Monthly ServicePoint Data Quality Review Homeless Services Providers

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- 4** Verify that the number of clients who are reporting as having no physical and mental health conditions at Exit (see **Figure 14**, above) is accurate.
- Click on the blue hyperlinked numbers to see which clients are reporting as having no disabling conditions.
    - If you need to add a disabling condition for a client, you will do so on the client's Entry.
  - Remember that many programs specifically serve clients with disabilities. Your number of clients with disabilities should reflect that.
  - Enter the number on the **Monthly Program Data Quality Review** (see **Figure 13**, above.)
- 5** Clients report as “**Condition Unknown**” (see **Figure 15**, above) if you have answered “**Yes**” to “**Do you have a disability?**” on the **Entry**, but failed to click on the **Add** button to specify the disability on the Disability Subassessment.

### Client Monthly Cash Income Amount

Client Monthly Cash Income Amount (Question 23)	<b>6</b>	Total number of clients that exited program. <input type="checkbox"/> If no exits, stop here.
	<b>7</b>	Number of clients with no income at Entry.
	<b>8</b>	Number of clients with no income at Exit.
	<b>9</b>	Total number of clients with same income at Entry and Exit. <input type="checkbox"/> Verified in the Exit Field that income and benefits were updated for all clients. On the Exit Field – Verify the following: <input type="checkbox"/> Destination was updated <input type="checkbox"/> Housing status was updated

Figure 16: CoC APR Question 23, on form

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23. Client Monthly Cash Income Amount - Adult Leavers							
Client Monthly Cash Income Amount Number of Adult Leavers							
Program Entry	Income at Entry	Income at Exit	Less Income at Exit	Same Income at Exit	More Income at Exit	Unknown Income Change	Average Change (\$) Monthly Income per Adult
No Income	7 43	8 42		9 42	1	0	10.53
\$1 - \$150	5	3	0	2	2	1	374.6
\$151 - \$250	4	3	0	3	0	1	0

Figure 17: CoC APR Question 23

- 6 Enter the **total number of clients** who entered the program. (See **Figure 16**, above.)
  - This is shown as “**Total number of records for Leavers**” on **Question 7** of the **CoC APR**. (See **Figure 12** on page 8 of this guide.)
- 7 Enter the **number of clients** who had **no income at Entry**.
  - You can click on the [blue hyperlinked number](#) to see which clients these are.
- 8 Enter the **number of clients** who had **no income at Exit**.
- 9 Enter the **number of clients** who had the **same income at Entry and Exit**.

### In the Exit – Verify the following:

**Exit Data**

Exit Date: 02/14/2012 12 : 01 AM

Reason for Leaving: 1 Completed program

If other, specify: \_\_\_\_\_

Destination: 2 Permanent supportive housing folod Rehab)(HUD)

If other, specify: \_\_\_\_\_

No Household members are included in this Entry/Exit.

Housing Status\*: 3 Stably housed (HUD) H G

Require of Adults and Unaccompanied Youth

Income received from any source in past 30 days?: 4 Yes (HUD) H G

Monthly Income/Benefit* (APR)					Add
	Last 30 Day Income	Source of Income	Start Date	End Date	
	\$ 500.00	Earned Income (HUD)	01/31/2012	01/30/2012	
	\$1500.00	Earned Income (HUD)	01/31/2012		
	\$1000.00	SSDI (HUD)	07/22/2010		

Showing Rows 1-3 of 3

Show Entire List In Window

Non-cash benefit received in past 30 days?: 5 No (HUD) H G

Non-Cash Benefits * (APR)					Add
	Amount of Non-Cash Benefit	Source of Non-Cash Benefit	Start Date	End Date	
	\$0.00	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	07/01/2010	01/30/2012	

Showing Rows 1-1 of 1

Show Entire List In Window

Figure 18: Exit Questions

- 1 Reason for Leaving Program.
- 2 Destination
- 3 Housing Status
- 4 Income
- 5 Non-Cash Benefits

## Client Served (Run in ServicePoint.)

Location: Reports/Provider Reports

**Client Served Report**

**Report Options:**

Provider Group: - Select -

Provider: 1 Everything for Everybody

Services: 2  This provider AND its children.  This provider ONLY.  
 Services Provided (other than shelter or referred services)  
 Shelter Stays  
 Referrals Served by the Selected Provider(s)

Grouping:  Clients Receiving Services as a Family.  Clients in a Household.

Service Code: [lookup](#)

Served Date Range: 3 03/01/2012 to 03/31/2012 (mm/dd/yyyy)

Served Before Date Range ('OLD' client count): to (mm/dd/yyyy)

Legal Adult Age: 18

 Build Report

Figure 19: Client Served Prompts

- 1 Select the name of your **Provider**.
  - 2 Run the report for both **Services Provided** and **Shelter Stays**.
  - 3 Use the current month as the **Operating Year Date Range**.
-  Click **Build Report** to create the report.

Total Number of Clients Served (line C)	<b>1</b>	<p>_____ Total Number of Clients: Adults + Children.</p> <p><input type="checkbox"/> Total number of clients: Adults + Children, above, is equal to Total Number of Records for All Clients on Question 7 of the CoC APR.</p>
--	----------	---

Figure 20: Client Served on Form

CLIENTS SERVED	Old	New	Total
<b>A. Adults</b>	<b>0</b>	<b>20</b>	<b>20</b>
Never Specified	0	0	0
Male	0	5	5
Female	0	15	15
Transgender	0	0	0
Unknown	0	0	0
<b>B. Children</b>	<b>0</b>	<b>24</b>	<b>24</b>
Never Specified	0	0	0
Male	0	14	14
Female	0	10	10
Transgender	0	0	0
Unknown	0	0	0
<b>C. Total (A+B)</b>	<b>0</b>	<b>44</b>	<b>44</b>

Figure 21: Client Served

- 1** Enter **Total Number of Clients Served** (as shown on Error! Reference source not found..)
- This number should be the same as **Total Number of Records for All Clients** on **Question 7** of the CoC APR. (See **Figure 12** on **page 8**)
    - The **Client Served** report shows clients who have received services during the time of the report.
    - The **CoC APR** shows clients who have an **Entry/Exit** for your provider, whether or not they have received services.
    - Click on the [blue hyperlinked number](#) of clients on each report to find who the clients are, and then compare the lists to troubleshoot discrepancies.